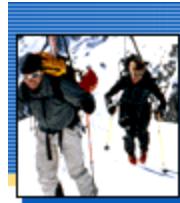


U.S. Army 2005 MWR Leisure Needs Survey



Fort Story
Virginia

CALIBER
an ICF Consulting Company

BRIEFING OUTLINE

Fort Story

□ **LEISURE NEEDS SURVEY**

- Project Overview
- Methodology
- Patron Sample
- Products

□ **SURVEY RESULTS**

- MWR Programs and Facilities
- Army Community Service
- Child and Youth Services
- Better Opportunities for Single Soldiers
- Leisure Activities
- Deployment and MWR
- Career Intentions

□ **NEXT STEPS**

PROJECT OVERVIEW

Fort Story

MWR STRATEGIC BUSINESS PLANNING MODEL

COMPONENTS

Analyzing and forecasting the external environment

Analyzing programs and markets

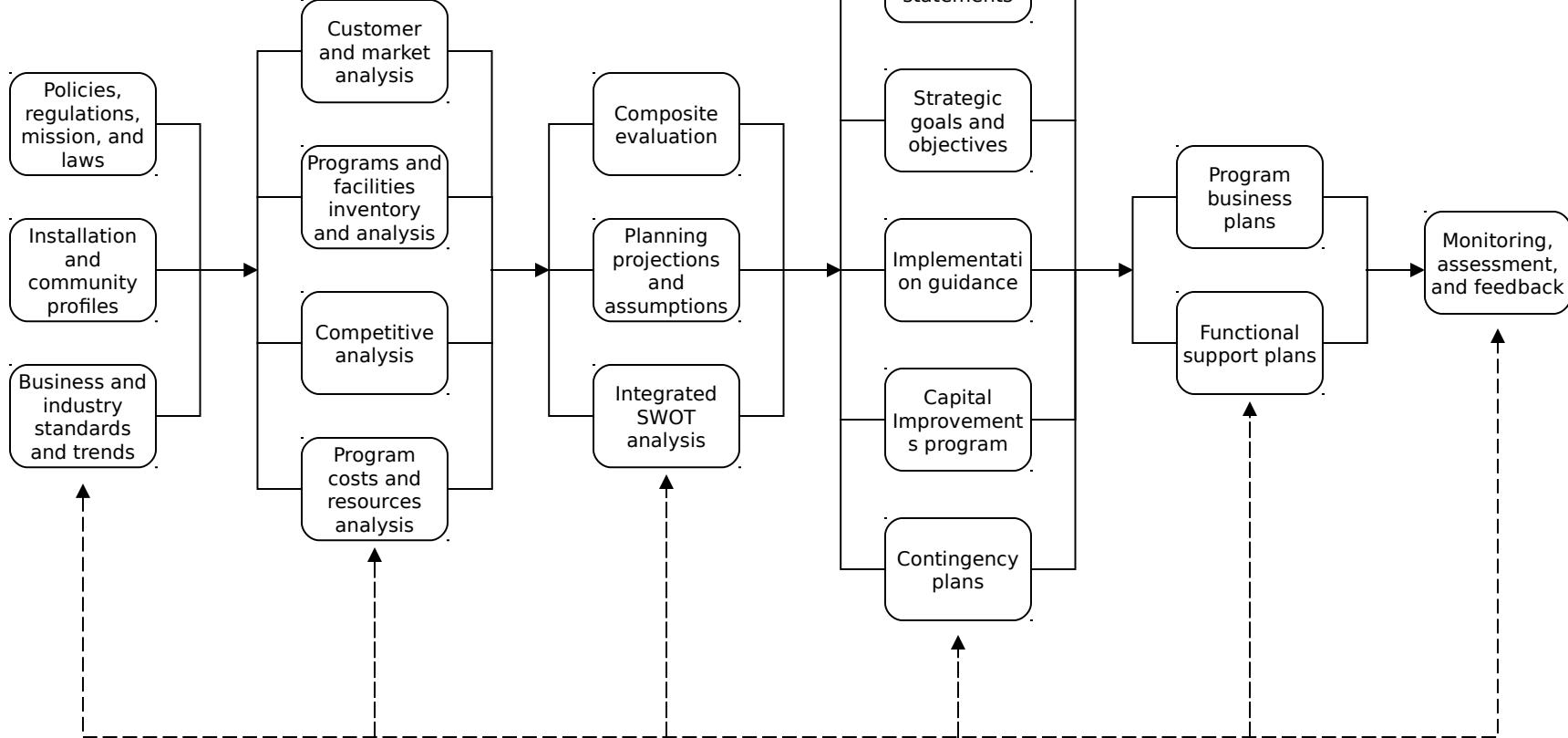
Developing alternatives

Formulating the strategic business plan

Formulating operational business plans

Monitoring and evaluating plan implementation

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METHODOLOGY

Fort Story

PROJECT SCOPE

- 92 sites were surveyed in 2005
 - Northeast (21 sites)
 - Northwest (10 sites)
 - Southeast (13 sites)
 - Southwest (14 sites)
 - Europe (20 sites)
 - Korea (9 sites)
 - Pacific (5 sites)
- 249,555 surveys were distributed throughout the Army to four patron groups:
 - Active Duty Soldiers
 - Spouses of Active Duty Soldiers (CONUS only)
 - DA Civilians
 - Retirees (CONUS only)
- 1,262 surveys were distributed at Fort Story

SURVEY ADMINISTRATION

- Designed to collect information on installation MWR programs and facilities as well as the leisure activities of your potential market
- 65 multiple choice questions; 7 questions were tailored to your specific installation issues



METHODOLOGY

Fort Story

□ **SURVEY ADMINISTRATION (Continued)**

- Active Duty and DA Civilian surveys distributed by installation POCs
- Spouses of Active Duty and Retiree surveys direct mailed to home addresses (CONUS only)
- Web survey option offered for the first time to all respondents

METHODOLOGY

Fort Story

□ SURVEY SAMPLE

- Four population segments
 - Active Duty
 - Spouses of Active Duty (CONUS only)
 - Civilian Employees
 - Retirees (CONUS only)
- Response Rates and Confidence Intervals for each patron group and overall sample

	<u>Survey Population</u>	<u>Surveys Distributed</u>	<u>Surveys Returned</u>	<u>Response Rate</u> *	<u>Confidence Interval</u> **
Army:					
Survey Totals	1,212,240	249,555	50,651	20.91%	±.43%
Ft. Story:					
Active Duty	1,724	323	50	15.48%	±13.66%
Spouses of Active Duty	324	393	30	7.63%	±17.04%
Civilian Employees	263	156	28	17.95%	±17.51%
Retirees	408	390	62	15.90%	±11.46%
Total	2,719	1,262	170	13.47%	±7.28%

* Response rate is calculated by dividing the number of surveys returned by the number of surveys distributed. It should be noted that low response rates (i.e., less than 20%) increase the chance that one or more subgroups (e.g., for active duty patron group, E1-E4 is a subgroup) may be over- or under-represented. Any patron groups with fewer than 15 survey respondents do not have their data reported to protect privacy and ensure representativeness.

**A confidence interval for a sample mean tells us the range in which we are likely to find the true population mean: Assume 300 surveys were returned for an active duty patron group of 1,350. 52% responded that they used the gym in the last year. The 95% confidence interval for this case would be ±5%. Thus there is a 95% chance that the TOTAL number of active duty at this installation who used the gym last year is between 47% and 57%. We can be 95% confident that between 634 and 770 active duty used the gym.

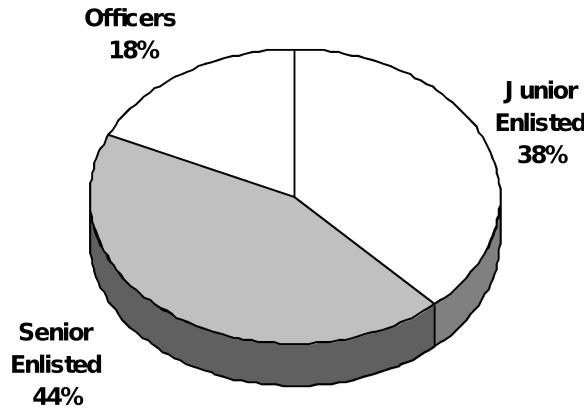
PATRON SAMPLE*

Fort Story

RESPONDENT POPULATION SEGMENTS

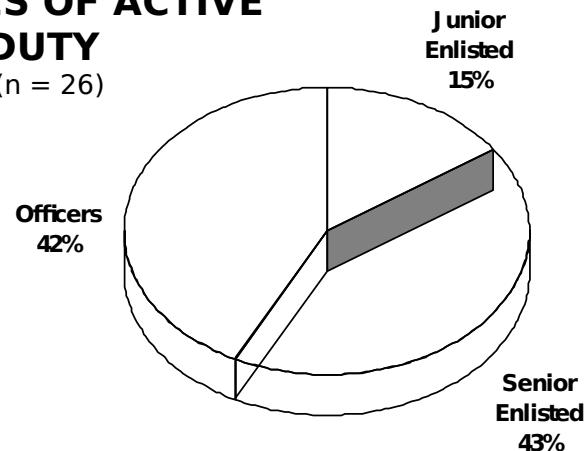
ACTIVE DUTY

(n = 45)



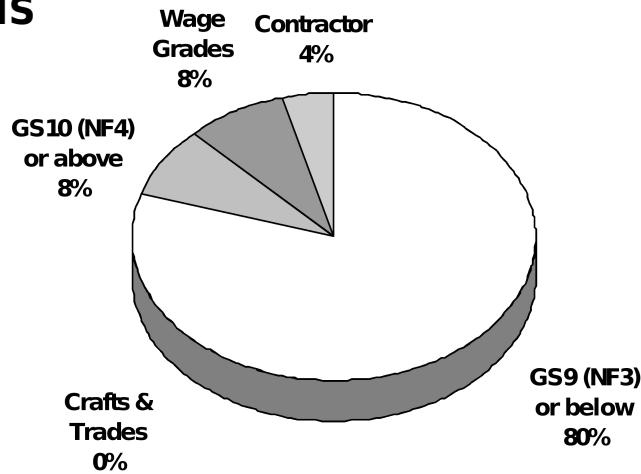
SPOUSES OF ACTIVE DUTY

(n = 26)



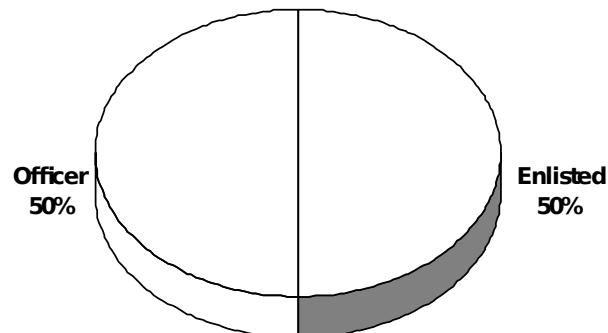
CIVILIANS

(n = 24)



RETIREES

(n = 44)



*The n provided for each patron group is equal to the number of respondents who provided their rank or paygrade.

PRODUCTS

Fort Story

□ **PRODUCTS**

- Comprehensive installation report of survey data in electronic form
- SPSS data file provided to installation representatives for further analyses, if desired
- Installation level briefing of findings
- IMA and Army level roll-up reports and briefings

□ **PRODUCT DISTRIBUTION**

- All products provided on CD
- CD distribution to installation MWR Directors, IMA Headquarters, and U.S. Army Community and Family Support Center

MWR PROGRAMS & FACILITIES: USAGE AT FORT STORY

Fort Story

MOST FREQUENTLY USED FACILITIES

Fitness Center/Gymnasium	64%
Recreation/Community Activity Ctr.	44%
Car Wash	40%
Athletic Fields	37%
Library	35%

LEAST FREQUENTLY USED FACILITIES

School Age Services	3%
Child Development Center	7%
Youth Center	7%
Bowling Pro Shop	8%
BOSS	11%

MWR PROGRAMS & FACILITIES: SATISFACTION AT FORT STORY*

Fort Story

FACILITIES WITH HIGHEST SATISFACTION RATINGS*

Fitness Center/Gymnasium	4.43
Bowling Center	4.28
Recreation/Community Activity Ctr.	
4.27	
Bowling Food & Beverage	4.25
Child Development Center	4.24

FACILITIES WITH LOWEST SATISFACTION RATINGS*

School Age Services	3.27
BOSS	3.76
Automotive Skills	3.87
Multipurpose Sports/Tennis Courts	3.93
Bowling Pro Shop	3.95

*Programs and facilities were rated on a 5 point scale: 5 = Very Satisfied and 1 = Very Dissatisfied

MWR PROGRAMS & FACILITIES: QUALITY AT FORT STORY*

Fort Story

FACILITIES WITH HIGHEST QUALITY RATINGS*

Cabins & Campgrounds	4.60
Fitness Center/Gymnasium	4.35
Post Picnic Area	4.34
Multipurpose Sports/Tennis Courts	4.30
Bowling Center	4.17

FACILITIES WITH LOWEST QUALITY RATINGS*

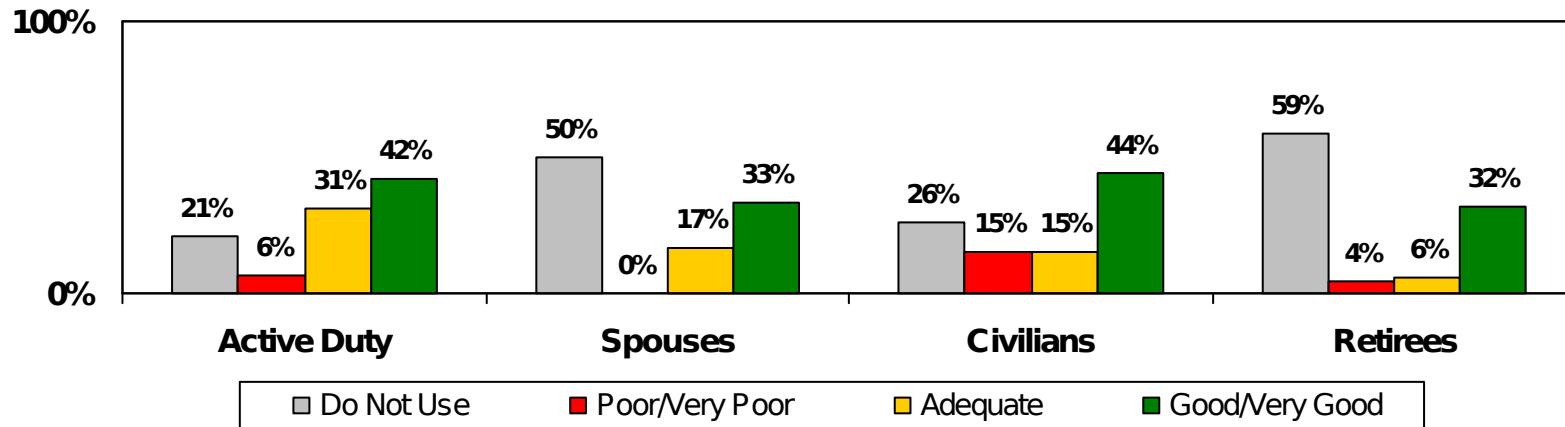
School Age Services	3.27
BOSS	3.73
Library	3.82
Automotive Skills	3.91
Car Wash	3.92

*Programs and facilities were rated on a 5 point scale: 5 = Very Good and 1 = Very Poor. These ratings are an average of three quality scores: Building/Facility/Space, Equipment/Furnishings, and Personnel.

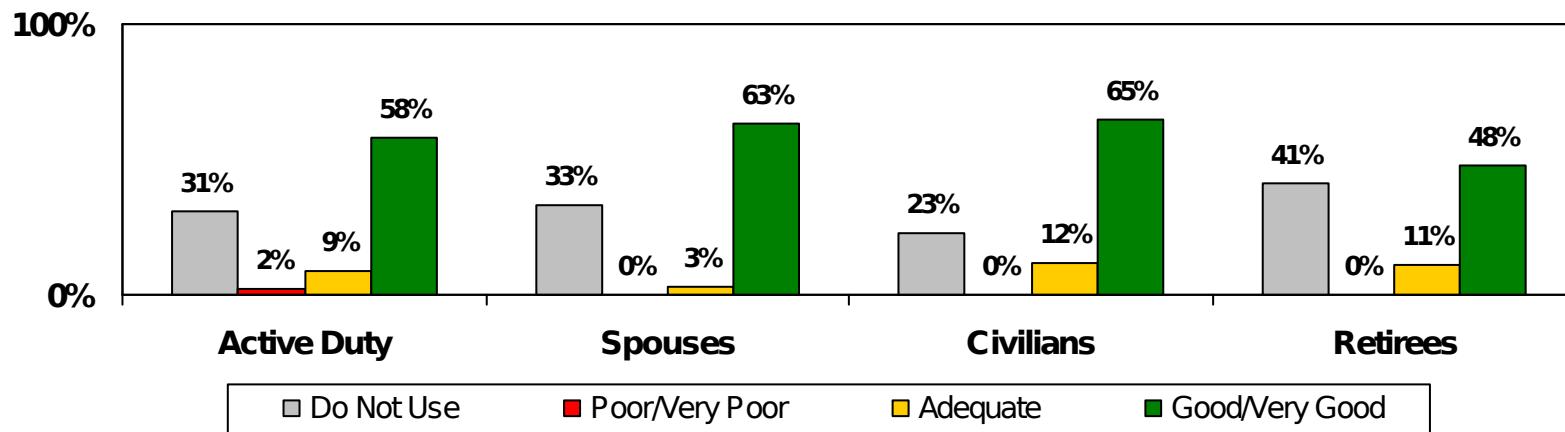
MWR PROGRAMS & FACILITIES: FOOD AND BEVERAGE SERVICES QUALITY

Fort Story

Quality of On-Post Services



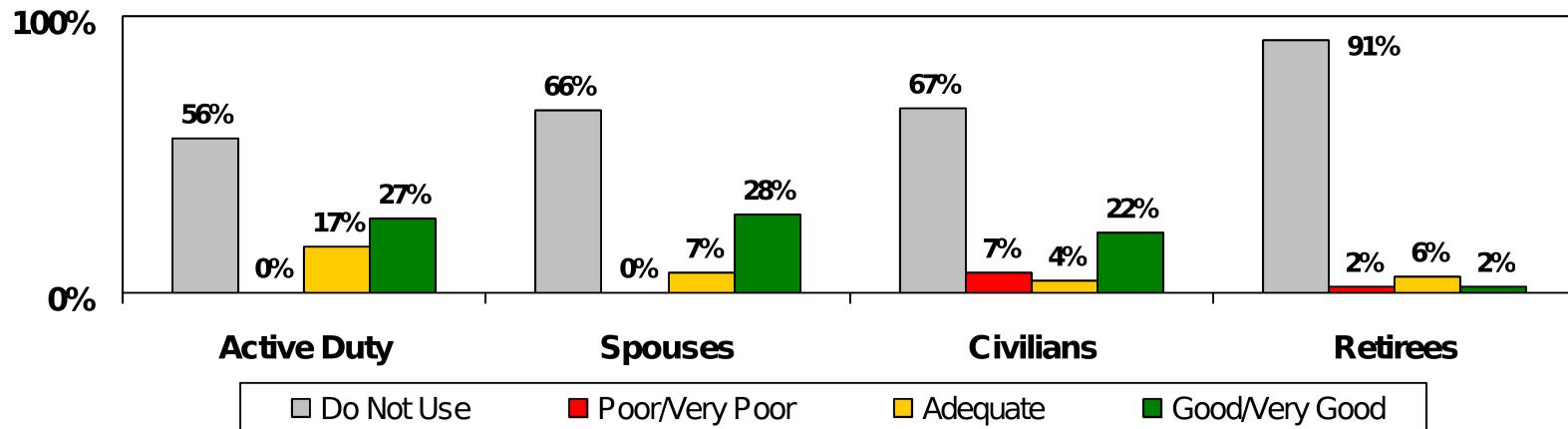
Quality of Off-Post Services



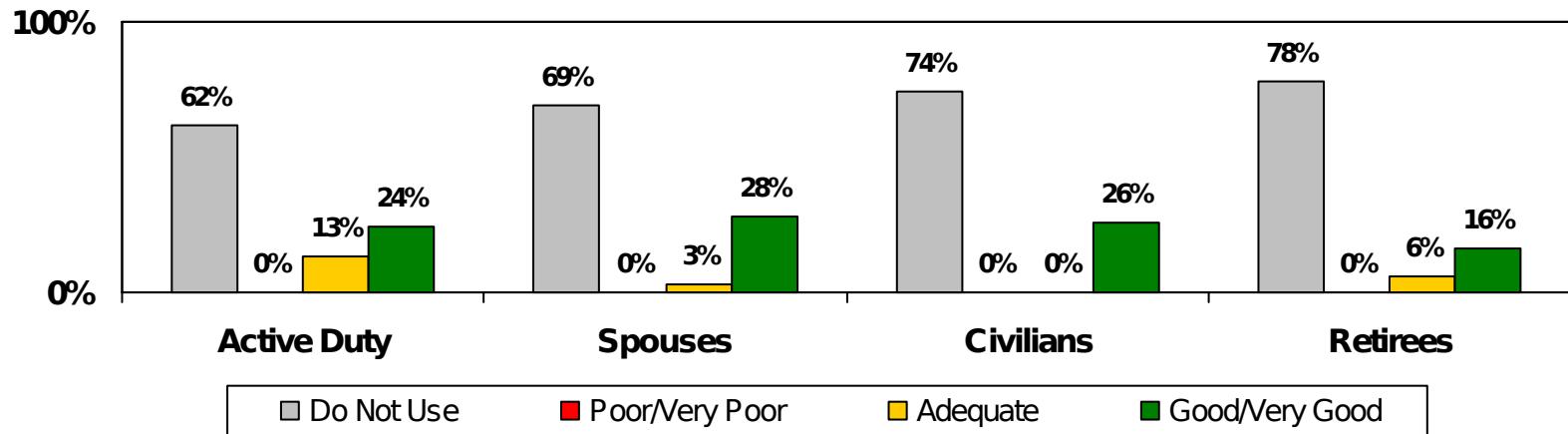
MWR PROGRAMS & FACILITIES: CATERING SERVICES QUALITY

Fort Story

Quality of On-Post Services



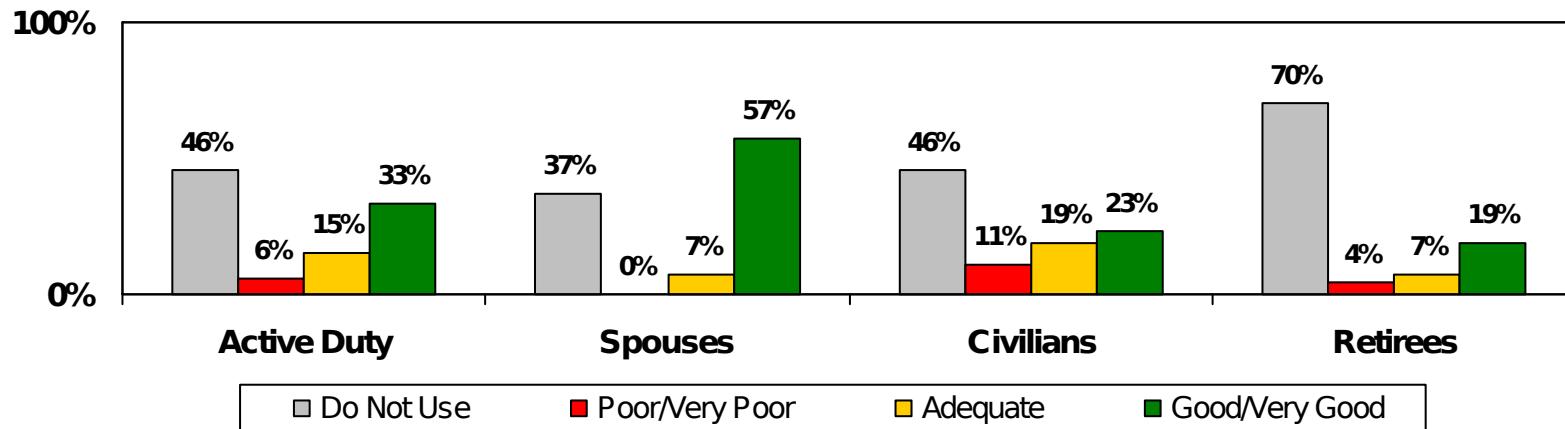
Quality of Off-Post Services



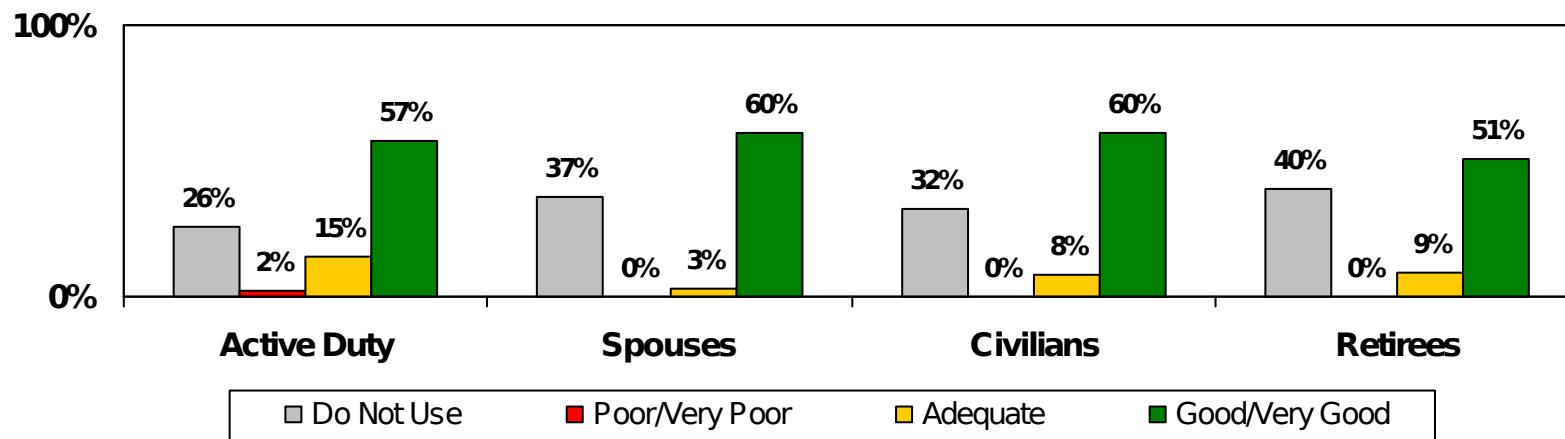
MWR PROGRAMS & FACILITIES: ENTERTAINMENT SERVICES QUALITY

Fort Story

Quality of On-Post Services

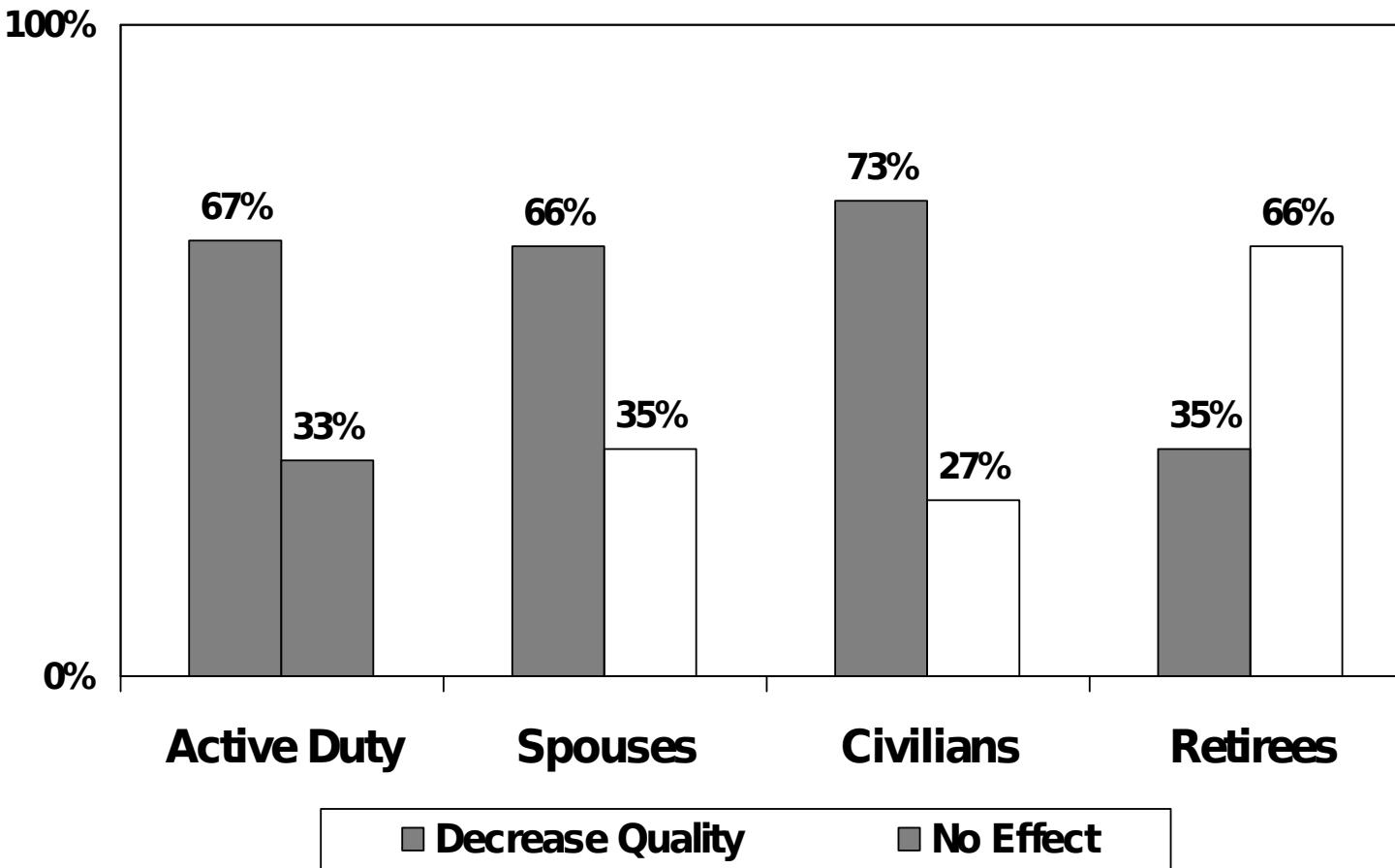


Quality of Off-Post Services



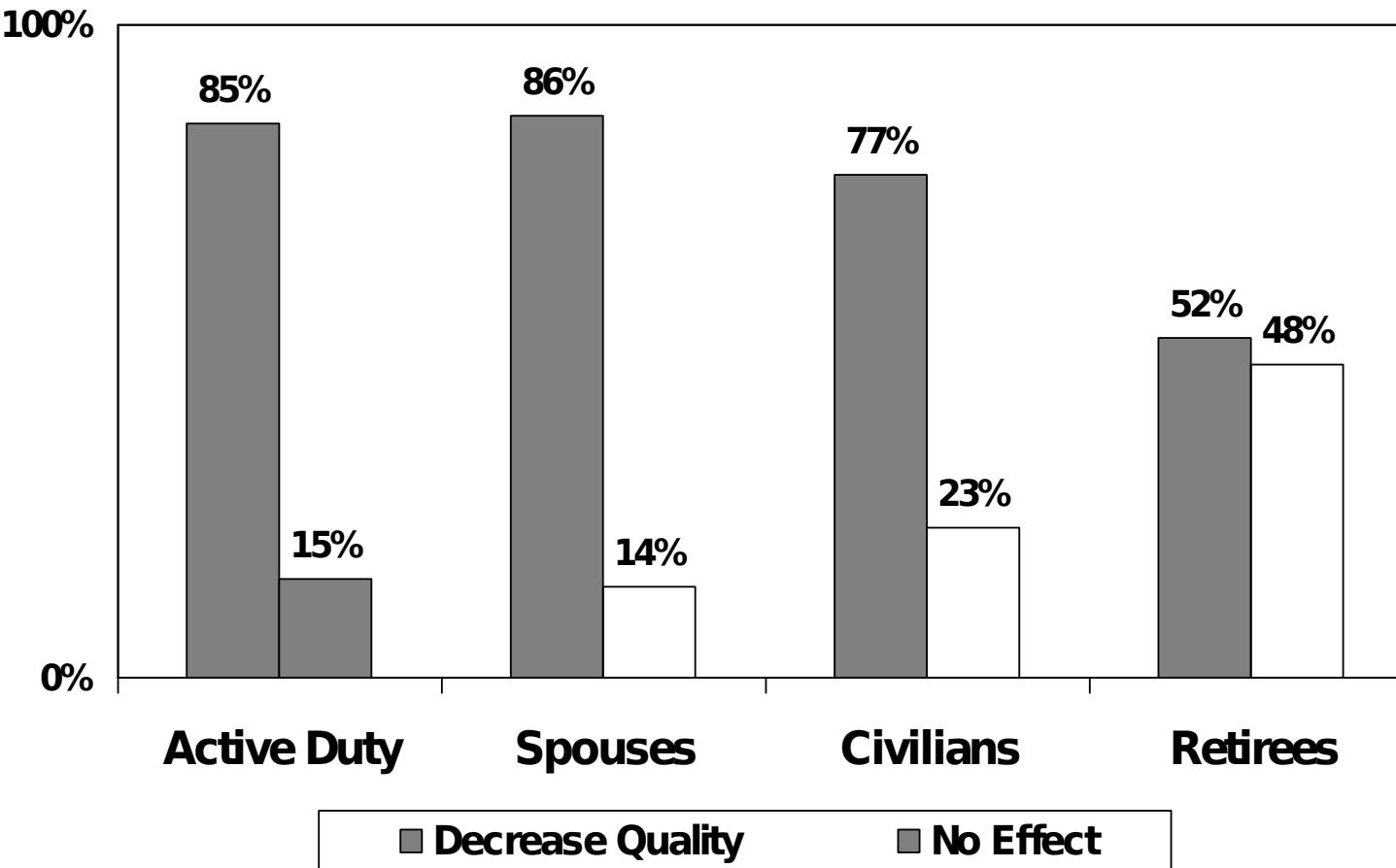
MWR PROGRAMS & FACILITIES: CLUB PROGRAM ELIMINATION EFFECT ON ARMY QOL

Fort Story



MWR PROGRAMS & FACILITIES: RECREATION PROGRAM ELIMINATION EFFECT ON ARMY QOL

Fort Story



MWR PROGRAMS & SERVICES: MOST AND LEAST IMPORTANT ACTIVITIES/PROGRAMS

Fort Story

Top 7 Activities/Programs

Fitness Center/Gymnasium	74%
Army Lodging	70%
Child Development Center	69%
Library	61%
Youth Center	58%
BOSS	57%
Bowling Center	52%

Respondents were asked to select the 7 most important and 7 least important activities and programs offered on an Army installation.

Golf Course Pro Shop	73%
RV Park	69%
Golf Course Food & Beverage	60%
Arts & Crafts Center	58%
Golf Course	55%
Marina	49%
Bowling Pro Shop	41%

Bottom 7 Activities/Programs

MWR PROGRAMS & SERVICES: SOURCES OF INFORMATION*

Fort Story

WHERE DO YOU GET INFORMATION?	ACTIVE DUTY	SPOUSES	CIVILIANS	RETIREES	TOTAL
Internet	12%	13%	12%	6%	11%
E-mail	20%	20%	46%	2%	20%
Friends and neighbors	31%	40%	31%	13%	29%
Family Readiness Groups (FRGs)	27%	10%	12%	4%	20%
Bulletin boards on post	41%	20%	27%	11%	33%
Post newspaper	20%	33%	42%	20%	24%
MWR publications	27%	20%	54%	30%	29%
Radio	2%	10%	0%	6%	3%
Television	4%	3%	0%	4%	4%
My child(ren) let(s) me know	0%	3%	0%	0%	0%
Other unit members or co-workers	29%	17%	31%	11%	25%
Unit or post commander or supervisor	31%	13%	8%	0%	22%
Marquees/billboards	8%	10%	27%	6%	10%
Flyers	55%	30%	65%	28%	49%
Other	2%	13%	4%	20%	6%
I never hear anything	2%	17%	4%	30%	8%

*The top 3 sources of MWR information are shaded for each patron group and the total population.

MWR PROGRAMS/SERVICES: GENERATE FEELING THAT THE ARMY CARES ABOUT ITS PEOPLE*

Fort Story

MWR PROGRAM/SERVICE	ACTIVE DUTY	SPOUSES OF ACTIVE DUTY
Army Child and Youth Services	100%	89%
Better Opportunities for Single Soldiers	90%	N/A
Army Community Service	78%	41%
MWR Programs and Services	90%	100%

* Positive = moderate, great or very great extent

ARMY COMMUNITY SERVICE: AWARENESS AND BENEFIT - ACTIVE DUTY

Fort Story

ACS PROGRAMS	AWARENESS	BENEFICIAL*	NOT BENEFICIAL*
Information and Referral	80%	94%	6%
Outreach programs	72%	82%	18%
Family Readiness Groups	84%	95%	5%
Relocation Readiness Program	70%	93%	7%
Family Advocacy Program	84%	90%	10%
Crisis intervention	74%	93%	7%
Money management classes, budgeting assistance	78%	88%	13%
Financial counseling, including tax assistance	74%	92%	8%
Consumer information	66%	83%	17%
Employment Readiness Program	64%	91%	9%
Foster child care	52%	80%	20%
Exceptional Family Member Program	76%	93%	7%
Army Family Team Building	62%	93%	7%
Army Family Action Plan	64%	92%	8%

* Percentage of Active Duty users

ARMY COMMUNITY SERVICE: AWARENESS AND BENEFIT - SPOUSES

Fort Story

ACS PROGRAMS	AWARENESS	BENEFICIAL*	NOT BENEFICIAL*
Information and Referral	50%	75%	25%
Outreach programs	30%	40%	60%
Family Readiness Groups	67%	73%	27%
Relocation Readiness Program	63%	73%	27%
Family Advocacy Program	57%	0%	100%
Crisis intervention	37%	0%	100%
Money management classes, budgeting assistance	43%	0%	100%
Financial counseling, including tax assistance	43%	17%	83%
Consumer information	27%	25%	75%
Employment Readiness Program	30%	0%	100%
Foster child care	23%	0%	100%
Exceptional Family Member Program	47%	75%	25%
Army Family Team Building	37%	60%	40%
Army Family Action Plan	30%	50%	50%

* Percentage of Spouses of Active Duty Member users

ARMY COMMUNITY SERVICE: POSITIVE IMPACTS ON ACTIVE DUTY AND SPOUSES

Fort Story

POSITIVE* ACS IMPACTS	ACTIVE DUTY	SPOUSES OF ACTIVE DUTY
Satisfaction with my job	73%	63%
Personal job performance/readiness	74%	63%
Unit cohesion and teamwork	76%	63%
Unit readiness	80%	56%
Relationship with my spouse	77%	42%
Relationship with my children	79%	36%
My family's adjustment to Army life	77%	54%
Family preparedness for deployments	77%	64%
Ability to manage my finances	76%	39%
Feeling that I am part of the military community	75%	60%

* Positive = moderate, great or very great extent

CHILD AND YOUTH SERVICES: POSITIVE IMPACTS ON ACTIVE DUTY AND SPOUSES

Fort Story

POSITIVE* CYS IMPACTS	ACTIVE DUTY	SPOUSES OF ACTIVE DUTY
Helps minimize lost duty/work time due to lack of child care/youth sponsorship options	100%	78%
Helps minimize lost duty/work time due to lack of child care/youth services	88%	78%
Plays a role in influencing my decision/my spouse's decision to remain in the Army	100%	56%
Allows me to work outside my home	88%	86%
Allows me to work at home	86%	80%
Offers me an employment opportunity within the CYS program	86%	57%
Allows me/my spouse to better concentrate on my/our job(s)	100%	88%
Provides positive growth and development opportunities for my children	88%	88%

* Positive = moderate, great or very great extent

BETTER OPPORTUNITIES FOR SINGLE SOLDIERS

(BOSS):

Fort Story

POSITIVE IMPACTS ON ACTIVE DUTY

POSITIVE* BOSS IMPACTS	ACTIVE DUTY
Satisfaction with my job	79%
Personal job performance/readiness	82%
Unit cohesion and teamwork	79%
Unit readiness	76%
Ability to manage my finances	71%
Feeling that I am part of the military community	82%
Relationship with my children (single parents)	94%
My family's adjustment to Army life (single parents)	79%
Family preparedness for deployments (single parents)	83%

* Positive = moderate, great or very great extent

LEISURE ACTIVITIES: PREFERENCES OVERALL AND BY PATRON GROUP

Fort Story

Top 10 Leisure Activities for All Respondents

Watching TV, videotapes, and DVDs	46%
Entertaining guests at home	42%
Going to beaches/lakes	37%
Going to movie theaters	35%
Internet access/applications (home)	35%
Internet access (library)	30%
Dancing	30%
Cardiovascular equipment	28%
Festivals/events	27%
Weight/strength training	27%

Top 5 for Spouses of Active Duty

Internet access/applications (home)	71%
Going to movie theaters	67%
Watching TV, videotapes, and DVDs	65%
Gardening	63%
Entertaining guests at home	56%

Top 5 for Civilians

Watching TV, videotapes, and DVDs	68%
Entertaining guests at home	62%
Internet access/applications (home)	52%
Picnicking	41%
Internet access (library)	40%

Top 5 for Active Duty

Watching TV, videotapes, and DVDs	36%
Going to beaches/lakes	36%
Entertaining guests at home	35%
Dancing	33%
Internet access (library)	32%

Top 5 for Retirees

Watching TV, videotapes, and DVDs	70%
Internet access/applications (home)	55%
Entertaining guests at home	53%
Going to movie theaters	48%
Going to beaches/lakes	48%

LEISURE ACTIVITIES: PREFERENCES BY ACTIVITY CATEGORY

Fort Story

Team Sports	
Basketball	15%
Softball	15%
Touch/flag football	11%
Volleyball	10%
Soccer	7%

Sports and Fitness	
Cardiovascular equipment	28%
Weight/strength training	27%
Walking	23%
Bowling	22%
Running/jogging	21%

Outdoor Recreation	
Going to beaches/lakes	37%
Picnicking	15%
Camping/hiking/backpacking	15%
Fishing	13%
Bicycle riding/mountain biking	11%

Entertainment	
Watching TV, videotapes, and DVDs	46%
Going to movie theaters	35%
Festivals/events	27%
Live entertainment	24%
Plays/shows/concerts	21%

Social	
Entertaining guests at home	42%
Dancing	30%
Happy hour/social hour	27%
Special family events	26%
Night clubs/lounges	24%

Special Interests	
Internet access/applications (home)	35%
Automotive detailing/washing	26%
Gardening	20%
Automotive maintenance & repair	17%
Computer games	15%

LEISURE ACTIVITIES: MARKET SHARE OF ACTIVITY PREFERENCES ON POST*

Fort Story

ACTIVITIES	PARTICIPATED PRIMARILY ON POST	PARTICIPATED PRIMARILY OFF POST	OVERALL PARTICIPATION
Internet access (library)	30%	N/A	30%
Cardiovascular equipment	21%	7%	28%
Weight/strength training	20%	7%	27%
Reading	20%	N/A	20%
Multi-media (videos, DVDs, CDs)	19%	N/A	19%
Going to beaches/lakes	18%	19%	37%
Reference/research services	18%	N/A	18%

*Top 7 leisure activity preferences ranked by on-post participation.

LEISURE ACTIVITIES: MARKET SHARE OF SPECIAL INTEREST ACTIVITY PREFERENCES BY LOCATION*

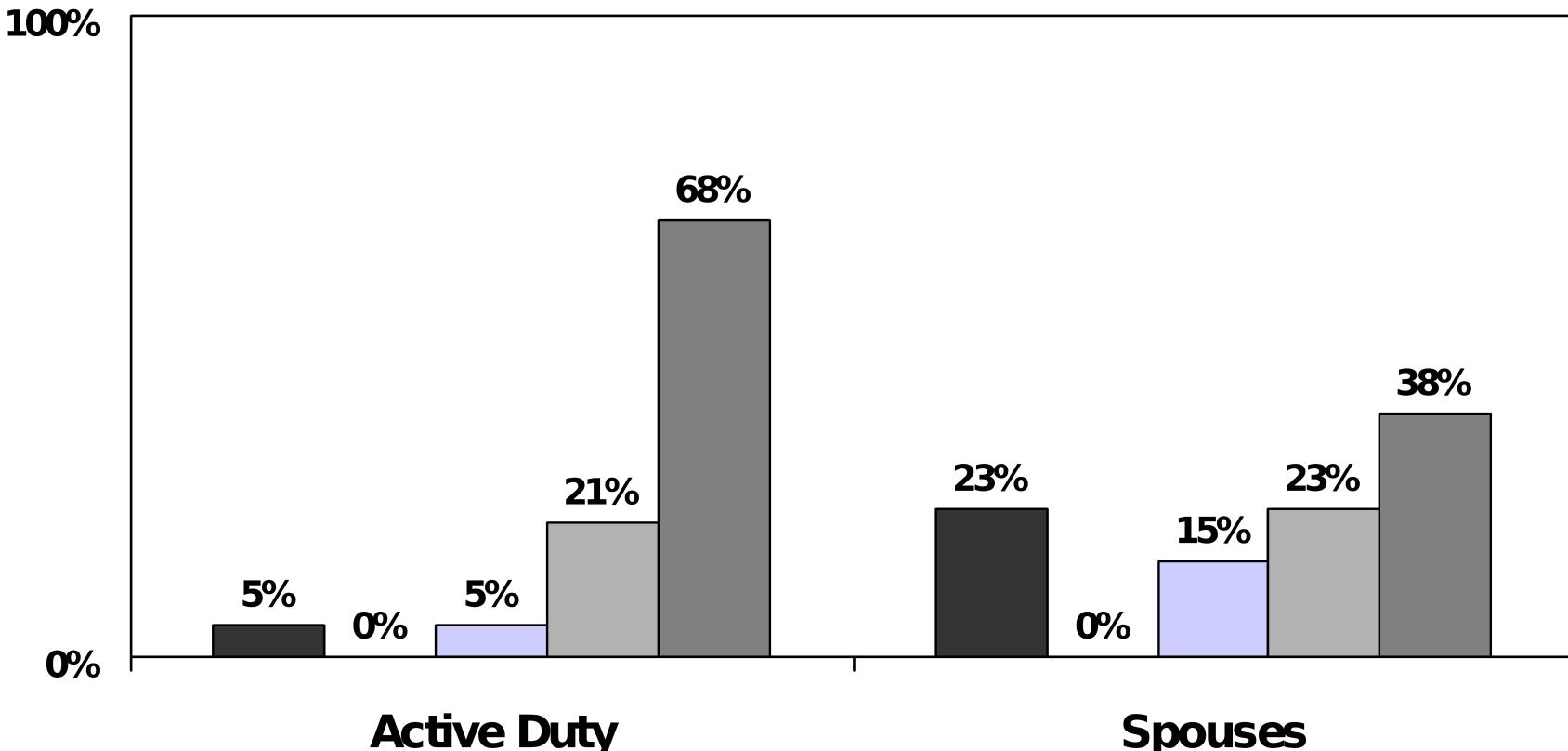
Fort Story

ACTIVITIES	PARTICIPATED PRIMARILY ON POST	PARTICIPATED PRIMARILY OFF POST	PARTICIPATED PRIMARILY AT HOME	OVERALL PARTICIPATION
Internet access/applications (home)	4%	4%	27%	35%
Automotive detailing/washing	4%	11%	11%	26%
Gardening	1%	1%	19%	20%
Automotive maintenance & repair	3%	8%	6%	17%
Computer games	0%	3%	12%	15%
Digital photography	0%	5%	7%	12%
Trips/touring	0%	9%	0%	9%

*Top 7 special interest activity preferences ranked by overall participation.

DEPLOYMENT AND MWR: IMPORTANCE OF ACCESS TO MWR DURING DEPLOYMENT

Fort Story

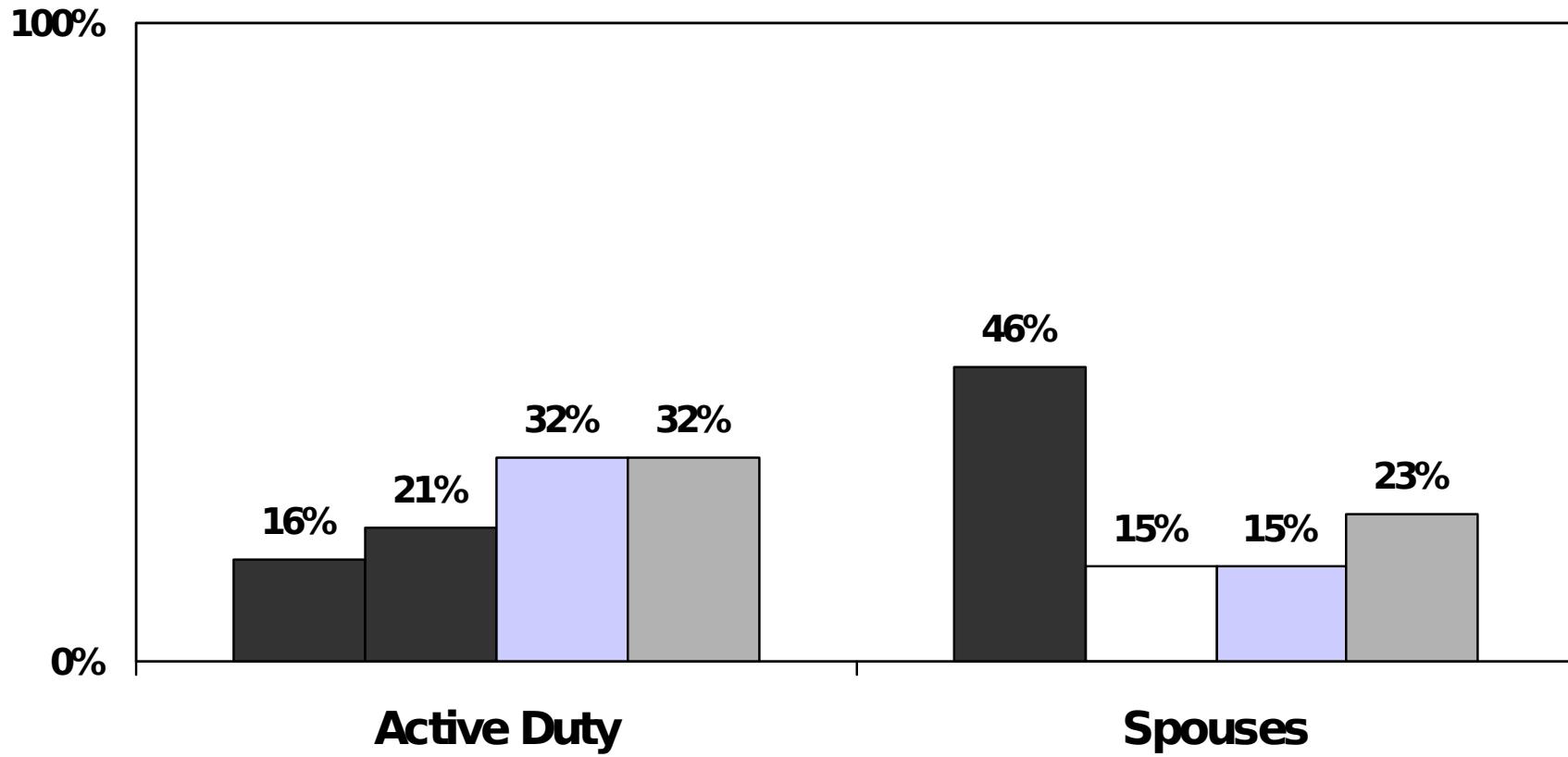


■ Not Important □ Slightly Important □ Moderately Important □ Important ■ Very Important

DEPLOYMENT AND MWR: USE OF MWR DURING DEPLOYMENT IN THEATER OR AT HOME

INSTALLATION

Fort Story



■ Did Not Use ■ Less Than Once Per Month ■ 1-3 Times Per Month ■ 4 or More Times Per Month

DEPLOYMENT AND MWR: USE OF MWR DURING DEPLOYMENT COMPARED TO NON-DEPLOYMENT

Fort Story

100%

39%

0%

31%

0%

23%

8%

0%

Spouses

■ Did Not Use ■ Much Less □ Somewhat Less □ About the Same □ Somewhat More ■ Much More

CAREER INTENTIONS: ACTIVE DUTY AND SPOUSES OF ACTIVE DUTY MEMBERS

Fort Story

Current Plans About Making the Military Your Career	ACTIVE DUTY
Definitely will not make military a career	11%
Probably will not make military a career	9%
Undecided	28%
Probably will make military a career	6%
Definitely will make military a career	47%

Do You Want Your Spouse to Make the Military His/Her Career?	SPOUSES OF ACTIVE DUTY
No	4%
Not Sure	11%
Yes	85%

NEXT STEPS

Fort Story

□ **INSTALLATION REPORTS**

- Review information on 91 leisure activities and up to 40 MWR facilities
- Share with Commander and program managers

□ **DATA APPLICATIONS**

- Action planning for program change and enhancement
- Strategic business planning
- Five year program planning
- Priorities for Project Validation Assessments
- Follow-up focus groups on items of interest or for clarification of findings
- Input into the Installation Status Report (ISR)